2010

City of Gillette ePlan Electronic Review Applicant User Guide

City of Gillette Department/Division Contact Information

Engineering and Development Services
Building Inspection Division
(307) 686-5260

Engineering Regulatory Division
(307) 686-5265

Engineering Capital Division
(307) 686-5265

Planning Division
(307) 686-5281

Version 2

City of Gillette

12/13/2010

Table of Contents

NOTE: For online access to this document, enter this address in your browser address field:
www.ci.gillette.wy.us/ePlans and look for the **Applicant User Guide** on the left hand side of the screen.
The most recent edition is: Version 2 dated 11/16/2010.

Introduction

This manual provides basic documentation on the steps involved in the **ePlans Electronic Review** process, which replaces the existing paper-based review with a computer-based approach. This new process utilizes digital documents in PDFs and CAD format. **ePlans Electronic Review** will allow everyone participating in the review process to enter their comments and exchange ideas within a secure digital environment.

This manual has been prepared as a general reference guide. There are text descriptions and screen images of the step-by-step tasks necessary to complete an application submittal and review using **ePlans**. It is not designed to present every detail on every element of the process. It offers a basic foundation for the process, serving as a point of reference as applications are being submitted and reviewed. This guide offers a *"how to"* for using the **ePlans Electronic Review** process.

We are here to assist you. If at any time in the process you have questions or concerns, do not hesitate to call. Be sure to ask to speak to a Submissions Coordinator in one of the following divisions/departments:

Engineering and Development Services
Building Inspection Division
(307) 686-5260

Engineering Regulatory Division
(307) 686-5265

Engineering Capital Division
(307) 686-5265

Planning Division
(307) 686-5281

General Information

The basic process to start a project has not changed. What has changed is that your project will now be submitted over the Internet. Applications and Submittal Requirement Forms can be found under the appropriate Division's webpage at the City's web site www.ci.gillette.wy.us, look for the **ePlans** logo!

Again, at any time, should you have questions or concerns, please call, as we are here to assist you. When you call one of the phone numbers listed on page 4, ask to speak to a Submissions Coordinator.

For your convenience, the City of Gillette will provide a public computer, which will be placed on the 2nd floor lobby in front of Building Inspection. The City will post a laminated instruction sheet at the public computer, complete with instructions for logging into **ePlans**, and how to upload your files. The City will accept CDs, DVDs or flash drives containing your electronic (digital) plans.

The scanning/digital conversion process must be accomplished prior to submittal to the City of Gillette. The City of Gillette will *not* be providing scanning services for sheets of any size. We recommend that you contact one of the numerous local service providers to assist you.

Required submittal formats for CAD (Computer-Aided Design) files:

1. DWF (print option within the CAD program)
2. Vector PDF (see page 7)
3. Other file formats accepted upon authorization by an **ePlans** Project Administrator

Note: On March 1, 2011, digital plan submission using **ePlans** will be required (some exceptions will apply).

ePlans Electronic Review is to be used for the formal review process for the following types of projects (this is not necessarily an all-inclusive list):

Engineering and Development Services
Building Inspection Division
(307) 686-5260

       Commercial Building Permits
       Residential Building Permits

Engineering Regulatory Division
(307) 686-5265

Engineering Capital Division
(307) 686-5265

       Permit to Construct
       Permit to Grade

Planning Division
(307) 686-5281

       Subdivision
       Commercial Site Plans
       Annexation Plat
       Preliminary Plat
       Final Plat
       Development Plan

Applying for Application/Permit through ePlans

The initial process has not changed you will still be required to contact the appropriate Department in order to start your project application in ePlans. There are forms you will need to fill out which will assist you in your request. Those forms and information can be found on our web site under the appropriate Departments. We have also provided those links for you, listed below, along with the phone numbers for your convenience. Should you have any questions regarding your application request please contact the appropriate Department and staff will be able to provide you with any information you will need to begin the process.

Building Inspection (307) 686-5260

Community Development/Planning (307)686-5821

Engineering Department Capital and Regulatory Divisions (307)686-5265

We would like to thank you for taking an interest in our electronic submittal process.

Glossary of Terms – ePlans

Applicant
Provides material for electronic review.

Change Mark
Digital icons (such as Post-It notes, revision clouds, callouts, etc.) used by Reviewers to enter comments during the process of making *'Markups.'*

DWF
Drawing Web Format. A format developed by Autodesk for plan review processes.

eform
Digital forms created within **ePlans** to request application reviews or re-submittal information.

Markup
Digital overlay file used to consolidate the *'Change Marks'* entered by the Reviewers into a single file.

Plan Reviewer
Individual within a department or agency assigned the task of reviewing and commenting on a specific project.

Project Administrator
Lead staff person assigned to oversee a project for each division. The Project Administrator will assign a staff member to oversee the day-to-day aspects of the project, and this person shall be contacted with any questions.

Project Status

Active:	In process, being reviewed, waiting for re-submittal, etc.
Completed:	The review process, by City staff, is complete and the project will be forwarded to approval boards (i.e. Planning Commission, Parks & Beautification Board, and City Council)
Archived:	Used to *'hide'* previously completed projects from the **ePlans** project list

Review Coordinator
Oversee the review process.

PDF:

Standard PDF

Digital file format used for documents, reports and other supporting non-drawing files, that were traditionally submitted in paper format.

Vector PDF

Digital file format that maintains AutoCAD layer and object information. This format allows a PDF to function similarly to an AutoCAD file.

Searchable PDF

PDF Searchable Image is a PDF Image Only document with the addition of a text layer beneath the image. This approach retains the look of the original page while enabling text searchability

Submissions Coordinator

Oversees the application and submission of materials

Document Standards

File Naming Standards

Go to: www.ci.gillette.wy.us/ePlans and click on the 'Naming Conventions Link.'

File Type Standards

Documents

Searchable PDF (see definition on page 5) files are accepted for calculations, reports and other supporting documentation (non-drawing files). **Adobe Acrobat Pro** or **Adobe Acrobat Standard** software will create this type of PDF without any intervention on your part. Print drivers are available for most application (programs) that allow the production of PDF with adobe installs.

For drawing files, AutoCAD software is almost exclusively used to prepare these types of files. Within the AutoCAD program, the DWF file type is preferred because it packages all pertinent files into one combined document, while maintaining AutoCAD layer information. It should be noted that the DWF file format is a print option.

Drawings

It is recommended that drawings created in AutoCAD are converted to a Vector PDF within the AutoCAD program itself. The newest **Adobe Acrobat Pro** (not the free version of Adobe Reader) will accommodate the creation of Vector PDF as well. It should be noted that the Vector PDF file format is a print option.

Vector PDF files will be accepted for non-engineering drawings that are submitted for new residential plot plans, commercial site plans, and larger commercial additions.

Standard PDF files will be accepted for smaller residential projects such as additions to plot plans and shed/deck/fence permit exhibit drawings.

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Applicant Registration

Before you can submit your first project, you must register with the City of Gillette. You only need to register with the City once! The City needs basic information from you such as:

First Name
Last Name
Email Address
Title
Company
Address 1
Address 2
City
State
Zip Code
Phone
Fax
Mobile Phone
Pager

NOTE: Each individual from your organization, who will participate in ePlans, will be considered by the system as an individual participant. Each individual should provide their own email address.

To obtain the Applicant Registration request form, go to www.ci.gillette.wy.us/ePlans, complete the form and provide a copy to the City of Gillette using one of the following methods:

1. **email:**

ePlan@ci.gillette.wy.us

2. **Mail:**

City of Gillette
ePlans Administrator – Information Technology
P.O. Box 3003
Gillette, WY 82717

3. **Fax:**

(307) 685-8885

Attention: **ePlans** Administrator – Information Technology

Once this process is complete, you will be considered an **Applicant** in the City's **ePlans** system.

Electronic Plans Submission Process

Once you have completed the **Applicant Registration Process** (link to form www.ci.gillette.wy.us/ePlans) you are ready for the next step in the process.

For each plan submission, you must complete the appropriate project application and submit the completed application to the appropriate Division.

Who do you call?

Depending on your project type, you will need to contact one of the following departments/divisions:

Community Development Department
Building Inspection Division
(307) 686-5260

Engineering Regulatory Division
(307) 686-5265

Engineering Capital Division
(307) 686-5265

Planning Division
(307) 686-5281

The **Submissions Coordinator** will guide you through the process.

- Your project will be entered into the system and you will receive an email notification.

- The email notification will include a project number and a link to Login to **ePlans**. If you are a first time **Applicant**, your email notification will provide you with a temporary password to Login to **ePlans**.

- As soon as you have completed uploading your files , within a reasonable amount of time you will receive an email notification indicating your project has been approved and will proceed through the formal review process.

Applicant ePlans Review Invitation

This system is driven by email notification. If these notification emails are **ignored**, without any action taken, the project will not move forward. Once notified, you must take action.

When your Application/Project is approved at the Submissions level, an **ePlans** Review invitation will be sent to your email address. The email contains your login information and information about the project, including a link to the project, as well as a complete set of "how to" instructions which allows you to upload files.

1. Login Information
2. Project Name Number
3. Project Access Link
4. '*How to*' Instructions

Logging In

NOTE: New to ePlans Electronic Review please take a moment and read the documentation found on our logon page under First time using ePlans? <u>Click here for setup instructions</u> this link also has information on IE8, Windows Vista or Windows 7. We have also provided a link on this page to install the ePlans components.

New Users

1. Prior to logging into the **ePlans** Application, the following actions must be completed. This application only works with Internet Explorer.
    a. If your computer has pop-up blockers installed, you will need to disable pop-up blocking in order to utilize **ePlans**. Disabling pop-up blocking will be required for each login instance, unless you select the "always allow pop-up" option (recommended).
    b. The login page has an MSI (Microsoft Silent Install) component required to install all necessary **ePlans** ActiveX controls. This installation will only need to be done once; if you utilize a different computer it will require another installation for each unique computer.
2. To sign in, enter <u>your</u> email address, as shown in the example below:

Install ePlans Review Components

Click here for setup instructions (browser requirements, Windows Vista or Windows 7 operating system and other beneficial information)
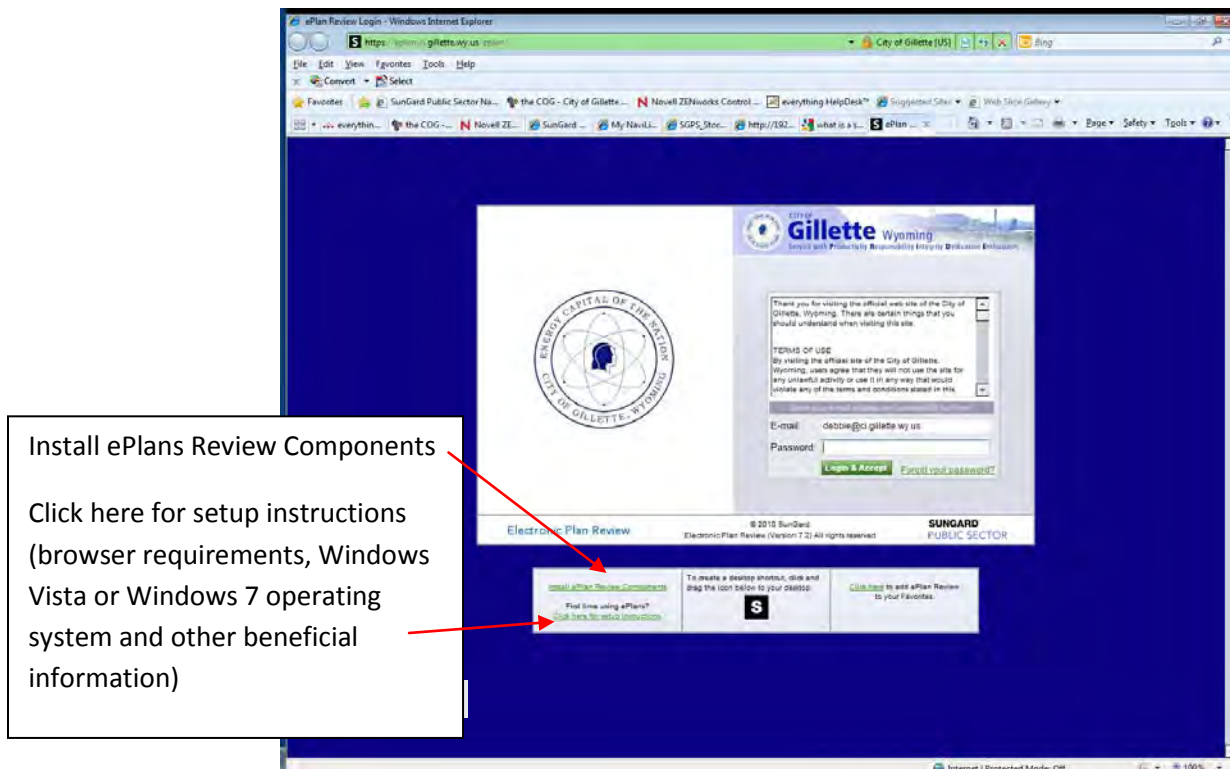
3. Enter your temporary password, which has been provided to you in your email.

4. Click the Login& Accept button.
5. You will be presented with your Profile screen.
6. In the current password box, enter your temporary password, then enter in a new password of your choice and confirm it. **Please note that your new password must be 8 characters long with a number in it. The first character cannot be numeric. Your password can not exceed 10 characters.**
7. Create a Security Question and answer it.
8. Fill in Contact Information boxes.
9. Click the Save button.

https://eplan.ci.gillette.wy.us - ePlan Review - Microsoft Internet Explorer

ePlan Review

Settings for **Debbie Rech** (debbie@ci.gillette.wy.us)

Change Password:

Current password:	
New password:	
Confirm new password:	

Password Reset Question & Answer:

Security question:	Favorite vacation
Security answer:	<Answer has been

Password must be between 8 and 10 characters, contain at least one digit and one alphabetic c

Contact Information:

First Name: *	Debbie	Last Name: *	Rech
Email: *	debbie@ci.gillette.wy.us	☑ HTML format ⓘ	
Title:			
Company:			
Address 1:			
Address 2:			
City:			
State/Province:	▼ Postal Code:		
Country:			
Phone:	307 686-5221	Fax:	
Mobile:		Pager:	
Stamps:		Browse... ⓘ	
Language:	en ▼		

LDAP/Active Directory Information:

Unique Lookup:	ⓘ	Base DN:		ⓘ
User Name:	ⓘ	Password:		ⓘ
Field Key:	ⓘ	Server:		ⓘ

Custom Metadata:

(20) NaviLine Login ID:	
(21) ActionBy:	

Save

NOTE: If you change your email address you will need to fill out the change of email request, which can be found at this link www.ci.gillette.wy.us/ePlans

Logging In

Existing Users

If you are a returning user, login to **ePlans** Review with your full email address and password. If you have forgotten your password, click on the '*Forgot Password*' button, answer the on screen questions, then a temporary password will be emailed to you. If you experience trouble with your security question and can't get your password reset please contact the City of Gillette ePlans System Administrator at 686-5221.

Uploading your Files

1. When you have successfully logged into **ePlans**, the projects screen will display. Any projects you have access to will display in the list. Any outstanding tasks that require your action are displayed in the '*My Task List*' area below the project list. Select the specific project that corresponds to the plans you will be uploading. The projects are listed in order by application number (i.e., BP10-00000116).
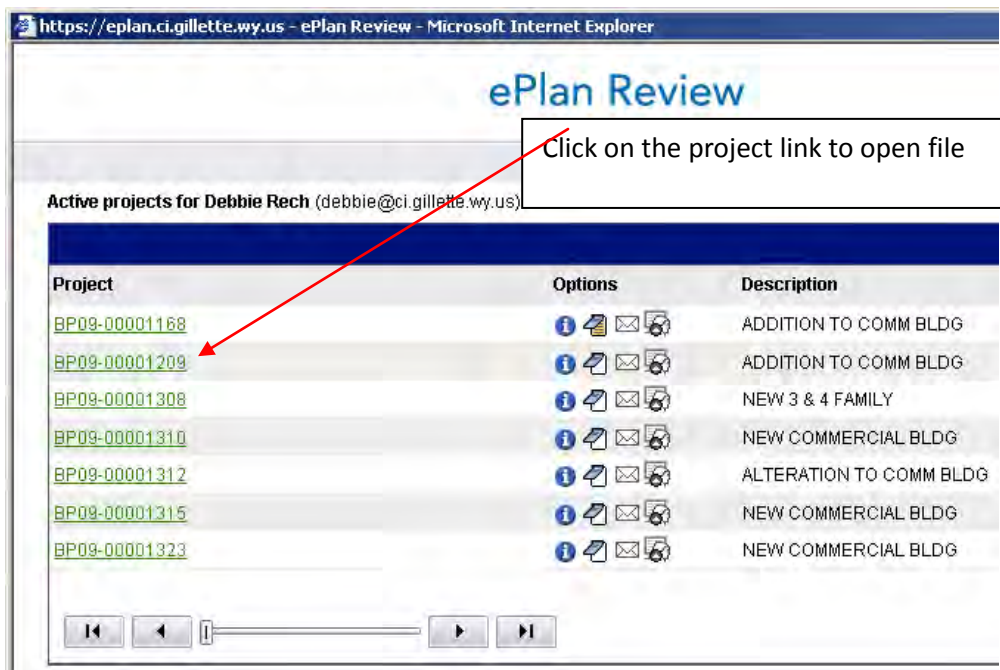
2. Click the *Drawing* folder or *Document* folder.
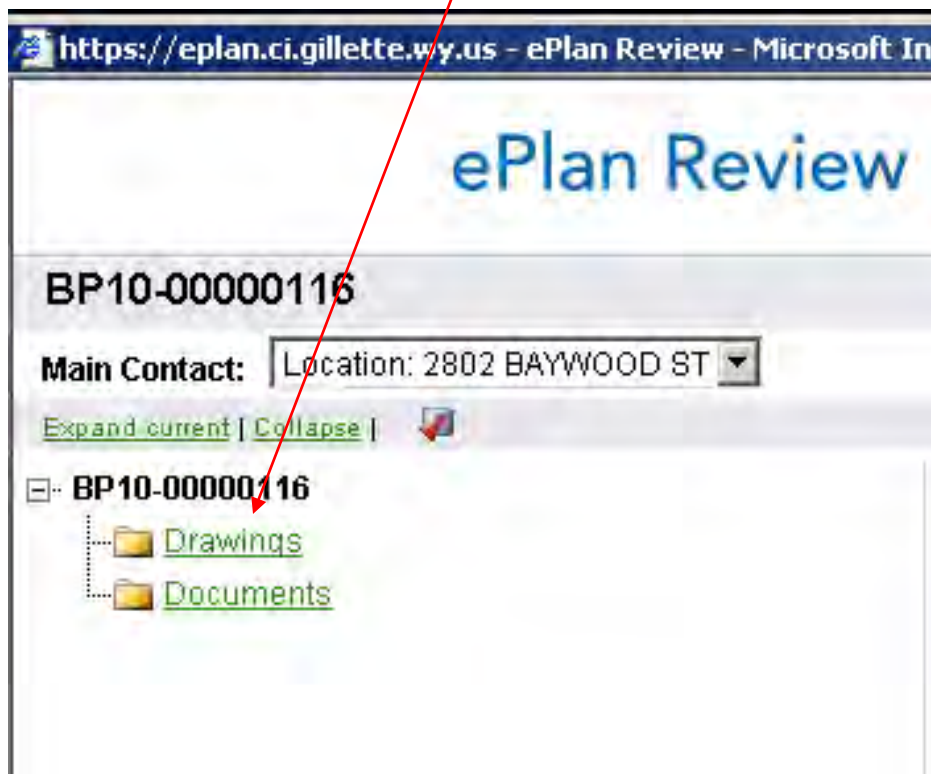
3. Click on the [Upload Files] button to upload your project files (drawings, documents, etc.)
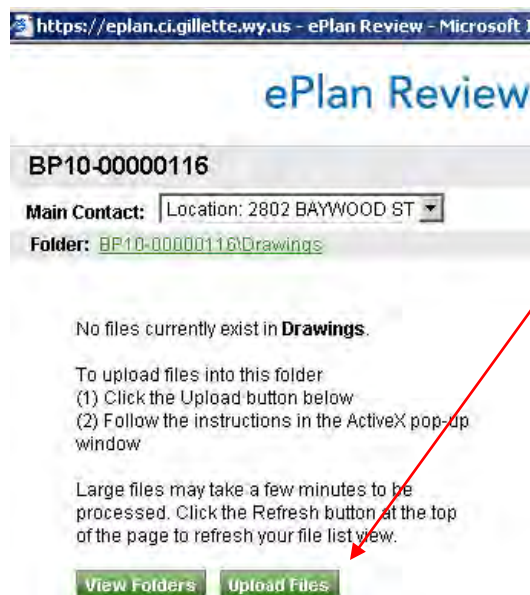
4. Click the [Select Files] button and browse to the location of the drawing(s) or document(s) to be uploaded
5. Select the file location on your computer or server. Select or highlight the files you want to upload; multiple files can be selected by using your Shift or Ctrl keys.
6. Click the Open button.
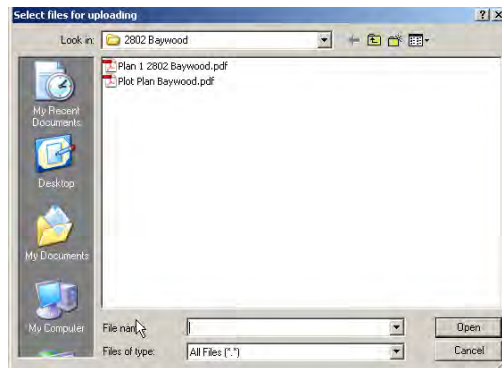
7. The files will then be copied to the upload window shown below.

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8. Click the [Upload Now] button. (Depending on the file size and/or the number of files you upload, this may take some time.)

NOTE: Document files shall be uploaded to the 'Documents Folder' and Drawing files shall be uploaded to the 'Drawings Folder.'

9. Click OK at this pop up box
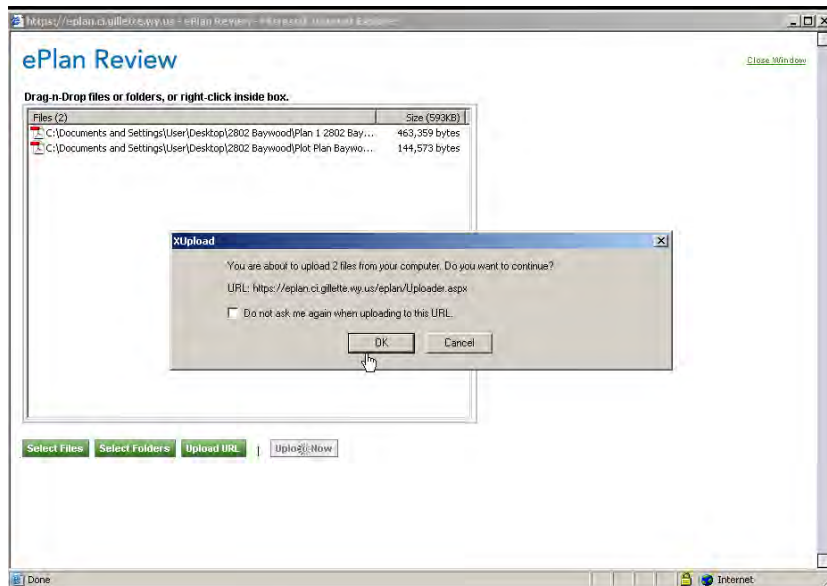
10. Click on the [Close] button to close out of the *'file upload complete'* dialog box.
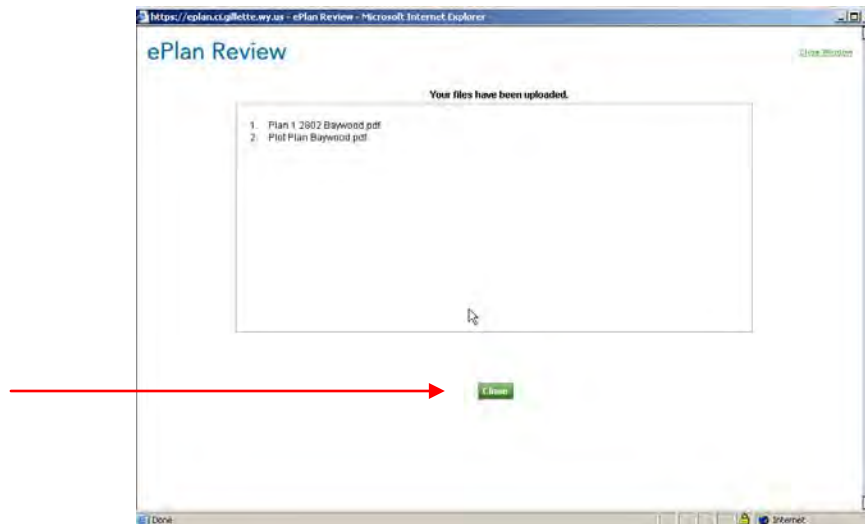
Once the files are uploaded to the correct folder(s) (Drawings into the Drawings folder and Documents/Exhibits/Reports/Letters into the Documents folder), the folder list will be replaced by thumbnail images of each file contained in the folder. Under each thumbnail, the file name, author, date, and any relevant file icons will be displayed.
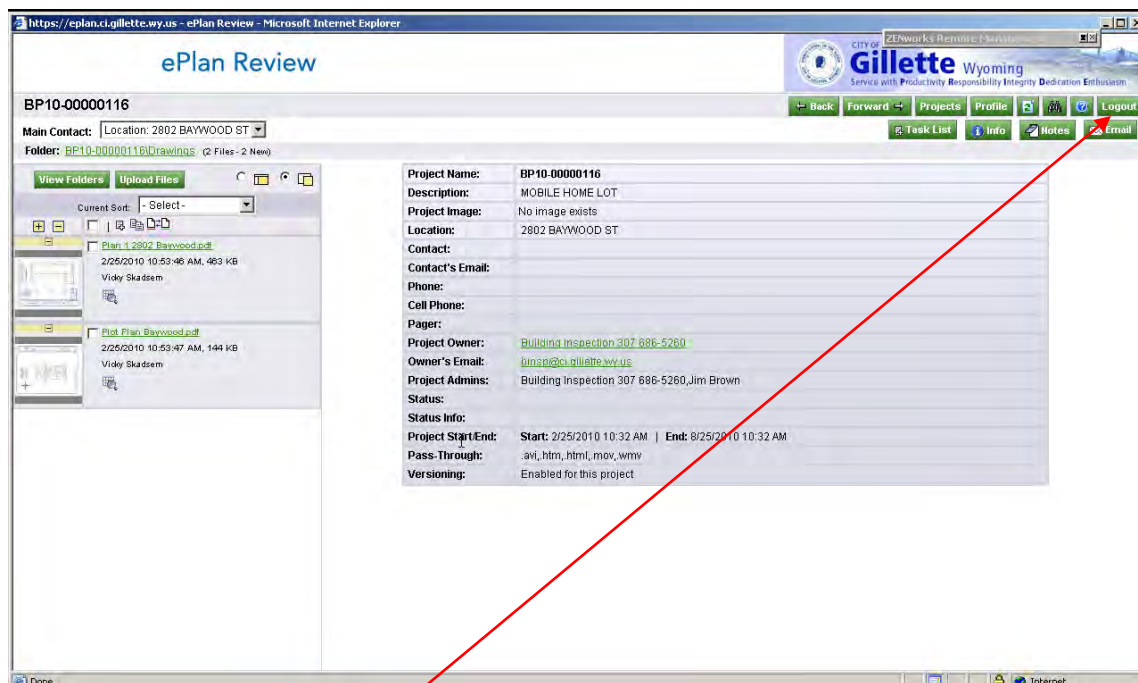
Congratulations! You have successfully finished the initial process of submitting your plans electronically. Please [Logout] after you have finished uploading your files. A notification has been sent to the Submissions Coordinator to determine if submittal requirements have been met (i.e. all relevant materials have been submitted for review).

Prescreening

After you have completed your upload, please allow **_at least one business_ _day_** for further notification instructions.

Prescreening Submission Has Been Approved

If your submittal is approved, you will receive an email notification that the prescreening has been approved. Your project will now move forward for '*Formal Review'.* Applicant will no longer have the ability to upload files to the project at this point.
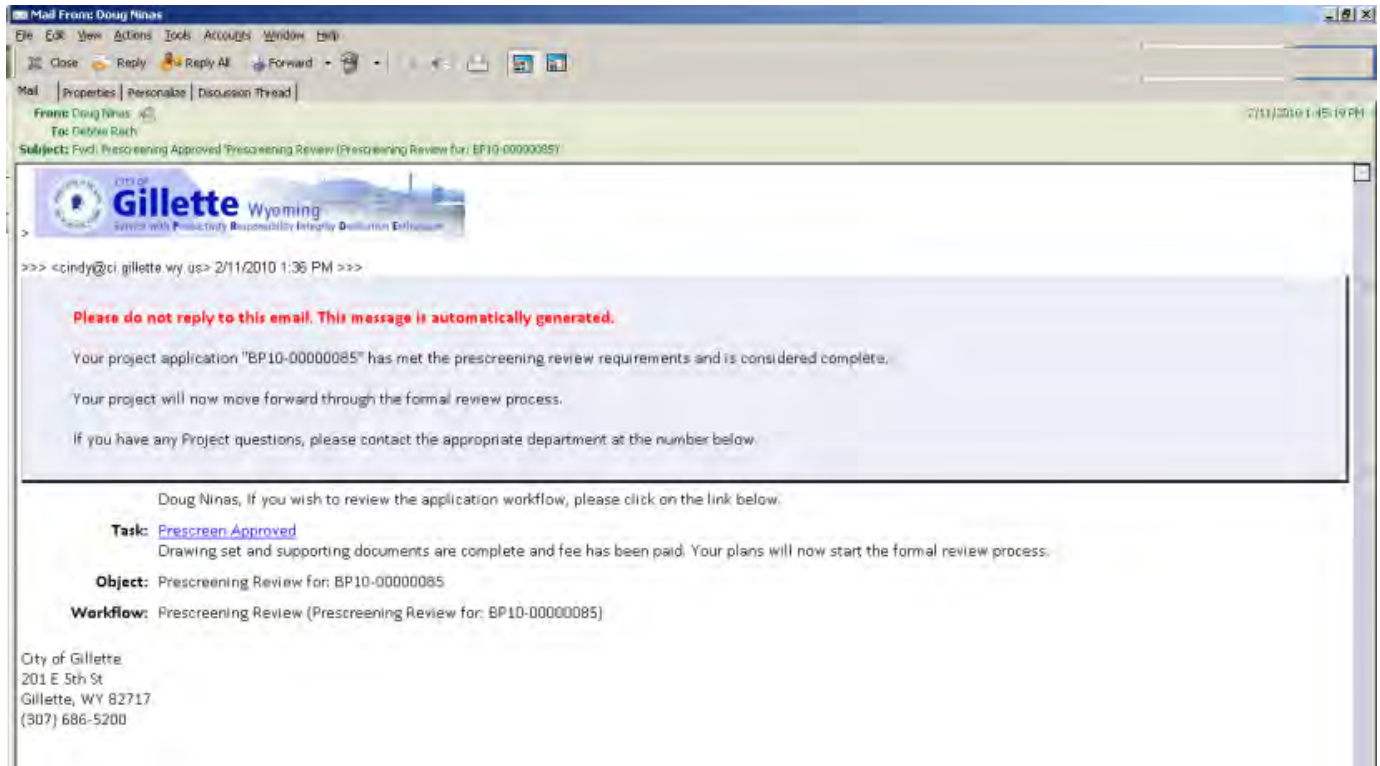
Folder Structure Standards

Any non-drawing files will be uploaded to the 'Documents' folder for each project
All drawings will be uploaded to the 'Drawings' folder (single sheet drawings).

Markup Name and Color Standards

Below is the Standard markup Department Listing and associated colors that will be used for each reviewing discipline for easy identification. A *'Markup'* (complete review) can have one or more *'Change Marks'* (individual comments)*.* Change marks are created to quickly identify a markup and associated comments.

Typically, all *'Markups'* (reviews) that contain any *'Change Marks'* may require a subsequent re-submittal of new drawings or documents prior to approval of your project.

Corrected files shall always be re-submitted with the EXACT SAME file name as the original submittal. The system will automatically add a revision number to resubmitted documents for you so the reviewers can easily differentiate between revisions and review the most recent document.

Department	Markup Color
Water	**Blue**
Wastewater	**Green**
Electrical Engineering	**Red**
Engineering	**Magenta**
Planning	**Purple**
Building Inspection	**Orange**

Public Works
    Parks
    Streets
    Solid Waste
	Yellow

GIS	**Maroon**
Fire	**Turquoise**
Outside Entities	**Brown**

Working With Files

View Project Files

To view a project file, simply enter a project folder i.e., Drawings, Documents, etc. and click on the file name or thumbnail image. The file will launch in the Brava! viewer.
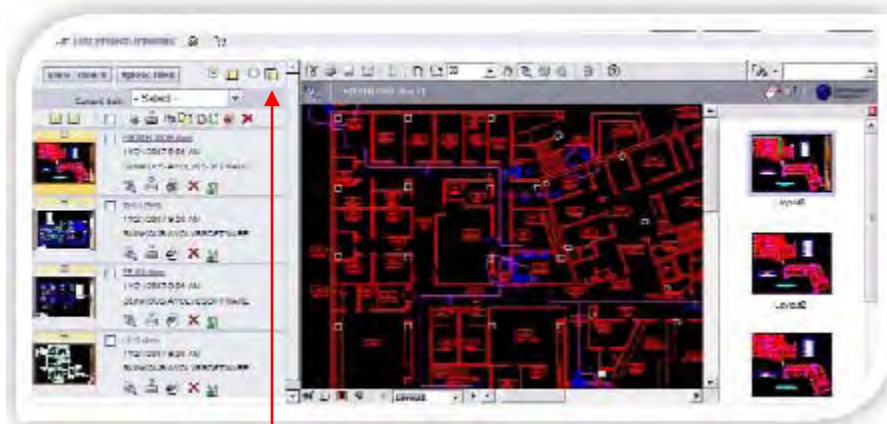
By default, the Brava viewer displays in the right pane of the ePlans Review window. To launch it in a separate browser window, click the ⬜ radio button above the file list. You can switch it back at any time by clicking the ⬜ radio button.

You can use the +/- icons to expand and collapse the file information to just display the filename. The top +/- icons control all files, or you can collapse each file individually with its own icon.

For help using the view and markup features of the Brava viewer, click the help button ⓘ (located in the top right corner of the screen) of the viewer to launch a separate online help window.

View File With Markups

If there is a markup the ◁ icon indicator is present. You can launch the file with the desired markup overlaid.

1. Click the markups icon ◁ . The View Markup List screen appears showing all associated markups.
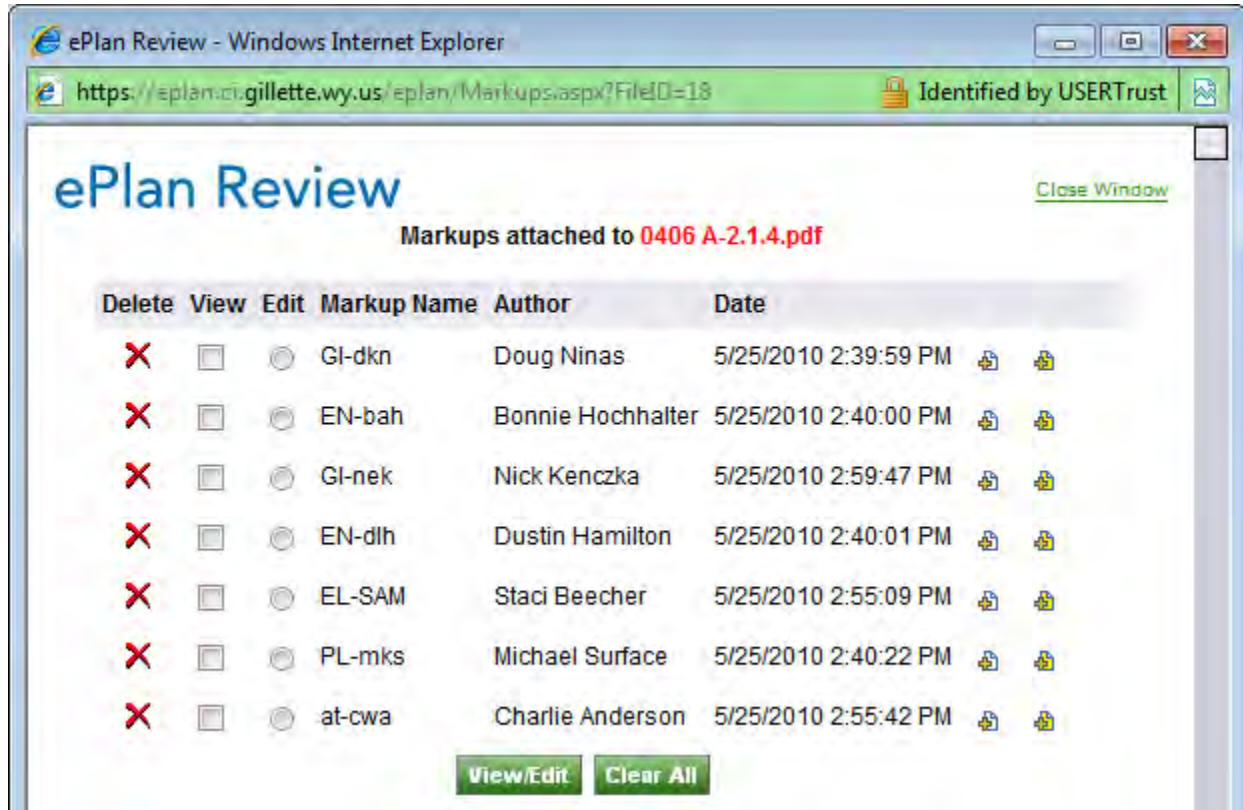
2. Click the **View** box next to the Markup Name you wish to view.   The file will open in Brava Viewer, with the markup overlaid on the file for review only.

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Export Markups to PDF

1. From the Project Drawings folder click on the file name with the (Markup) icon
2. Click on the Markup icon and click on Open for Review
3. You will be presented with a pop up
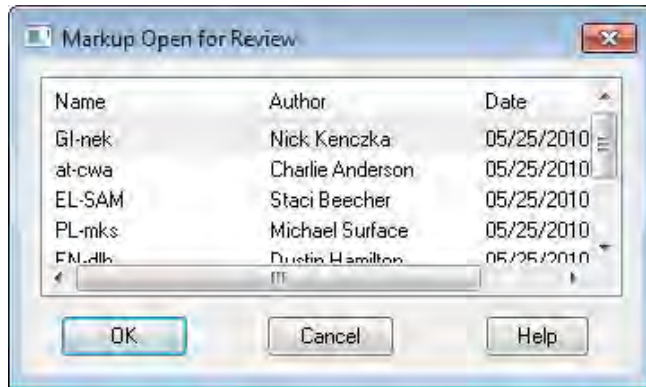
4. Select the Markups you wish to publish. (You can select specific markups or all of them by holding down either your shift or control key). Once you have made your selection you will be presented with the screen below.
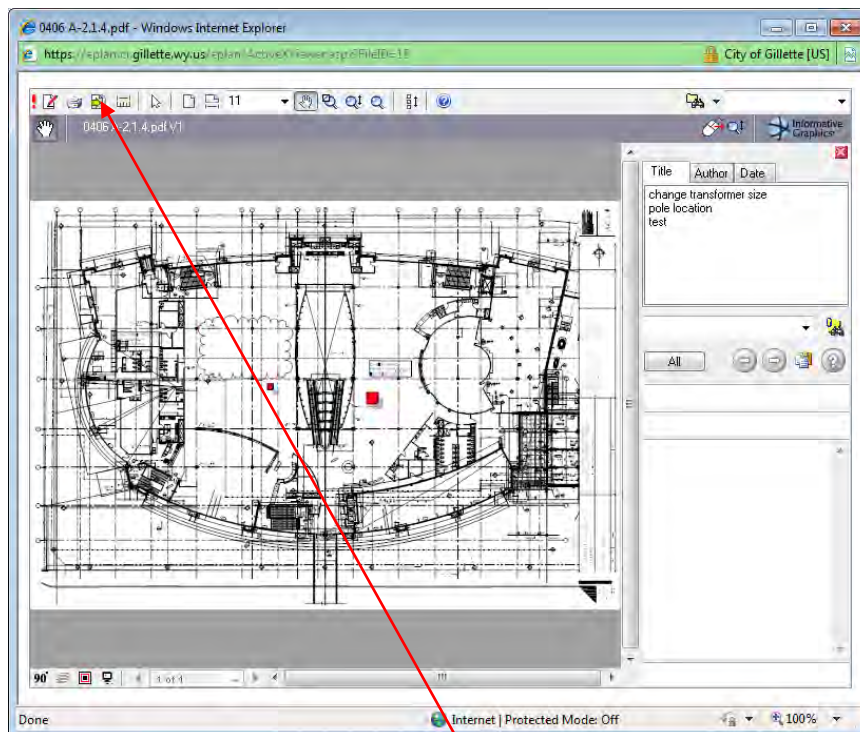
5. Click on the Save and Publish icon
6. Click on the Publish to PDF
7. On the PDF Publish Options select the following:

a. Under "Markup " select Burn-in current Markup
b. Select "Include Changemark Information"
c. Under the" Include" section select Bookmarks
d. Click OK
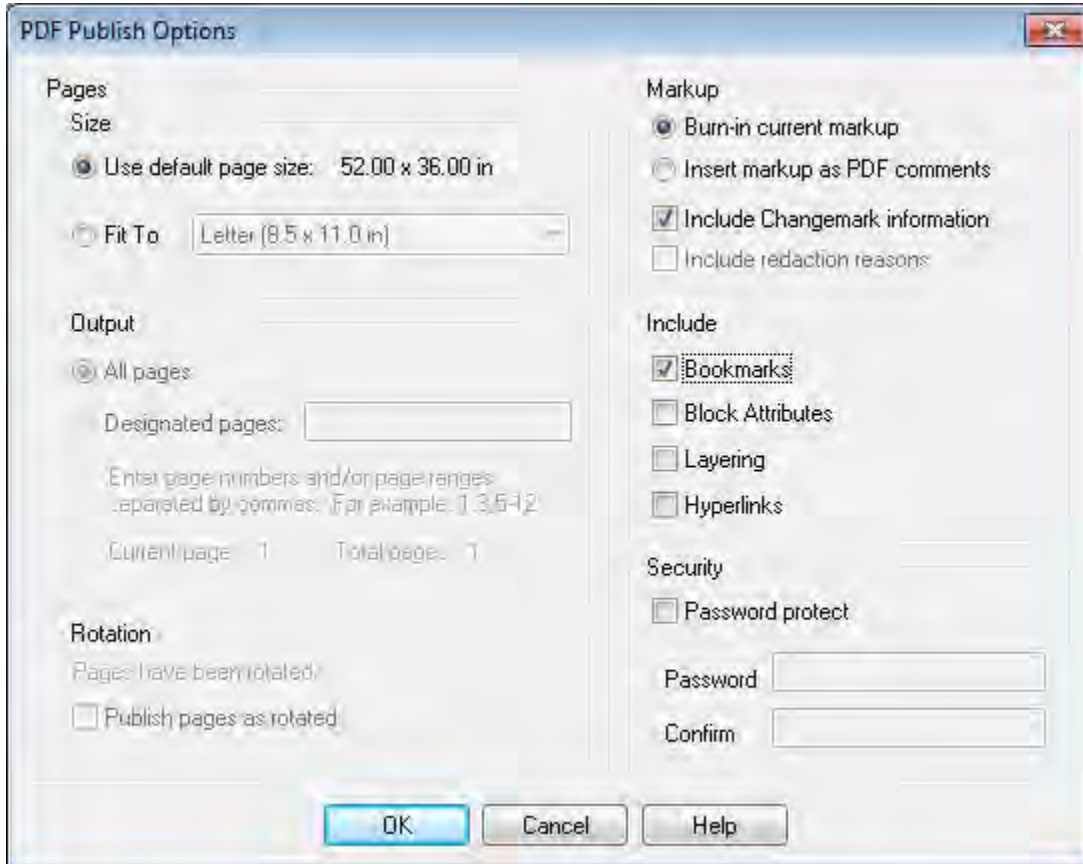
8. On the Publish Option pop up click Save to File

9. Click OK
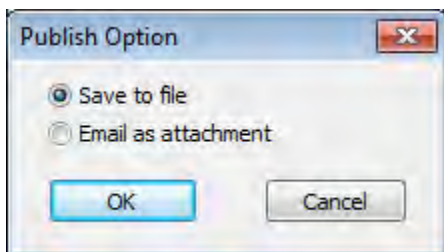
10. Select where you are going to save this file

11. Name the File

12. Click Save

13. Open the saved file. It will include the change marks (which will be numbered) on the drawing along with a second page with the comments associated with those change marks.
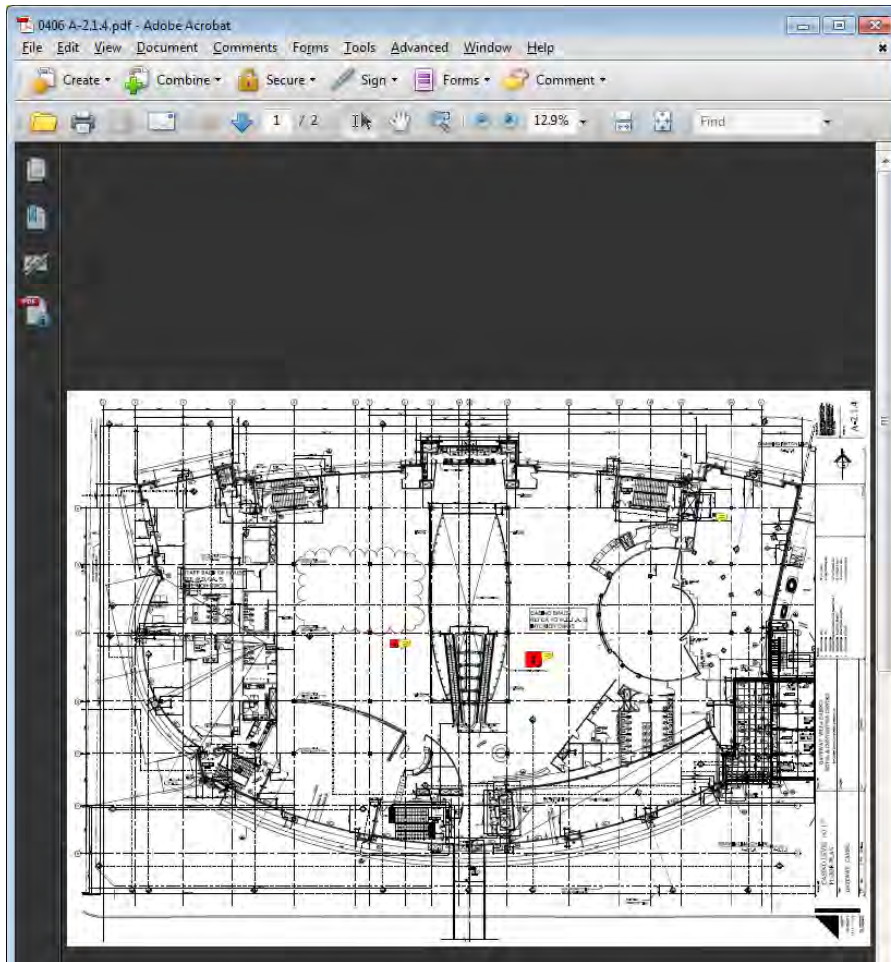
Page 2 seen below with the noted comments for the change marks.
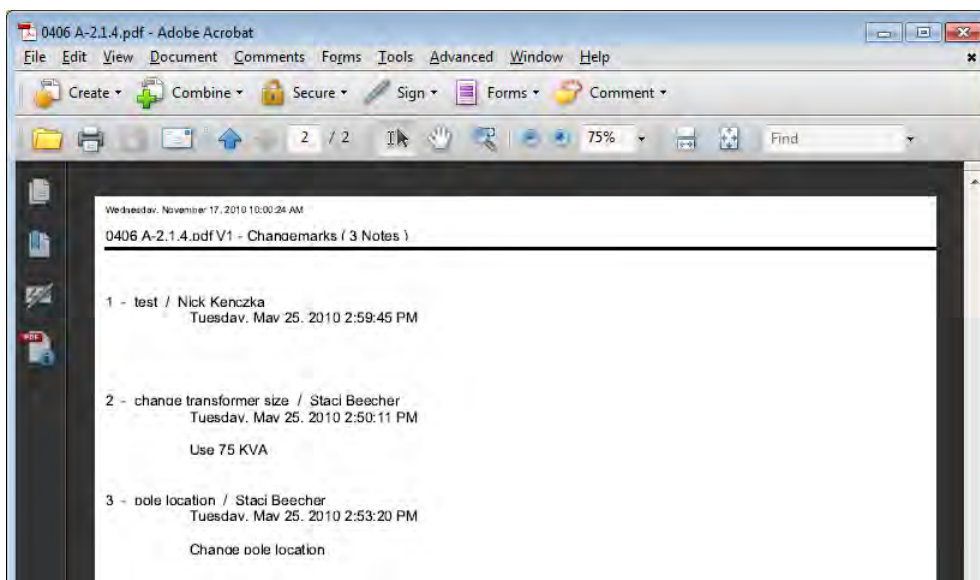
Applicant Resubmit Process

Review Requested Corrections

If corrections are requested, please follow these steps:

1. You will receive an email notification from the Review Coordinator requesting corrected/revised drawings or documents.
2. Click the link in your email to access the corrections requested in **ePlans**.
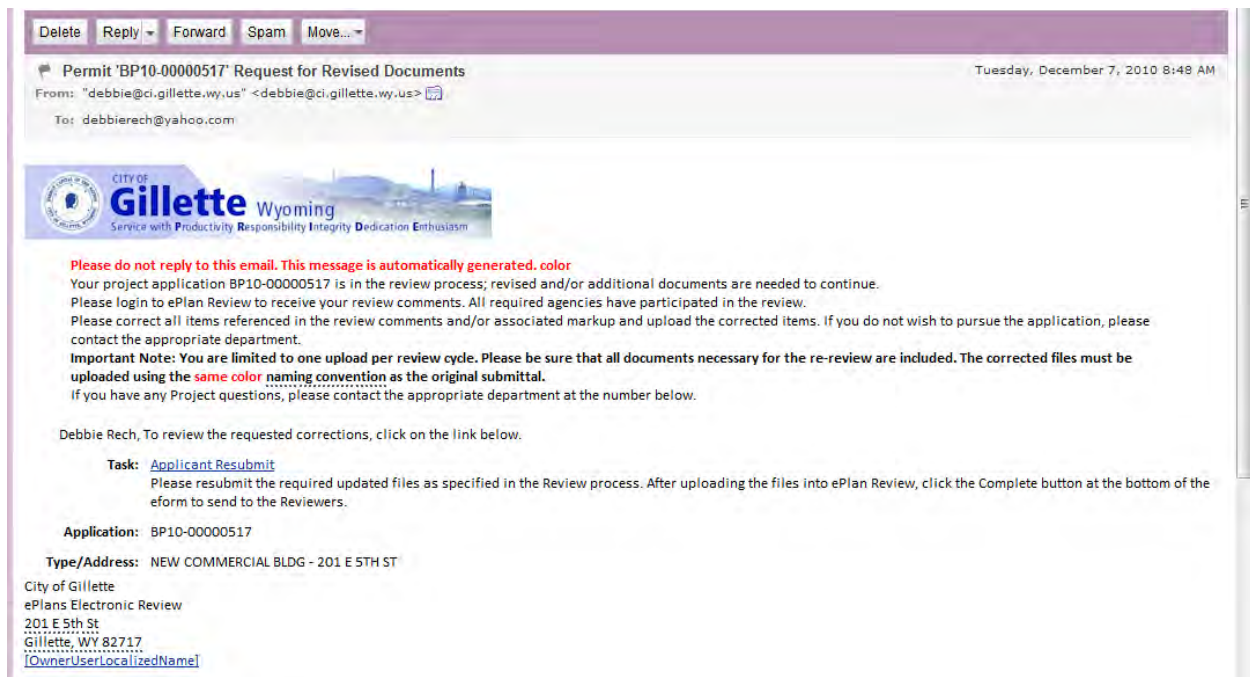
3. The eform will open.
4. Click the link '*Applicant Resubmit*' in this email to access the Prescreening information (this will take you directly into the project. The ePlan Review Resubmit Request form will automatically open for you . See example screen shot #1 on page 26.
5. Scroll down to the Review Agency section. In the comment/markup column there should be information on what correction/additional information is being requested, or clicking on the 'Review' hyperlink located underneath the Comments/Markup box.
6. After identifying the missing requirements close the ePlan Review Resubmit Request

Example Screen shot #1

1. Upload the missing document(s)/file(s) by clicking on the project link.

2. Once you have finished uploading your corrected file or additional information click the Project button

3. From the *My Task List* in the project window click on the Permit Review for BP10-0000xxxxx. This will open you re-submittal task

4. Once the form opens, scroll down to the Agency Review section.
5. Step 1: check the box here where it indicates that *I have addressed all of the pending review items indicated below.*

1. Scroll down further to the Revised Document Upload section.
2. Step 2: check the box here where it indicates *I have uploaded the revised drawings into the appropriate folders using the Same File name as the original documents.* There are also instructions listed here for your convenience.

3. Click the Resubmit Complete button

Approval

When all Reviewers have approved the plans and the Review Coordinator completes the review workflow, you will be notified via email notification to pick up your permits.

Print Approved Plans

After all fees associated with your **ePlans** Project have been paid, i.e., mail in or present payment in person, you will receive an email indicating that your application has been paid in full. There will be instructions on how to print and download the Approved Plans. Plans will need to be printed and shall contain wet-stamps and ink signatures for Campbell County records and for the Property Site.

The City of Gillette will require printed sets with wet stamps and ink signatures as follows:

|	
Permitted projects for Engineering	2
Permitted projects for Planning	8
Permitted projects for Parks Board	1

Download Files

If you have download privileges, you can download a file by clicking the ![icon] icon next to the desired file.
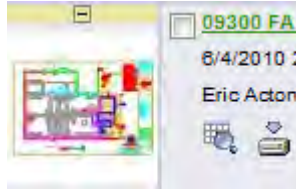

Remember that you will need the source application or a viewing utility such as Brava Reader for AutoCad files, Adobe Reader for PDF files and Word for documents, installed on your pc, to view the file.

To download a group of files, select the check box for each file you wish to download and click the *Download Checked Files* ![icon] icon at the top of the thumbnails panel.
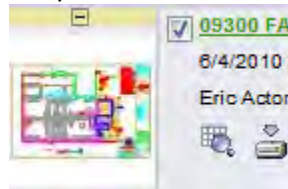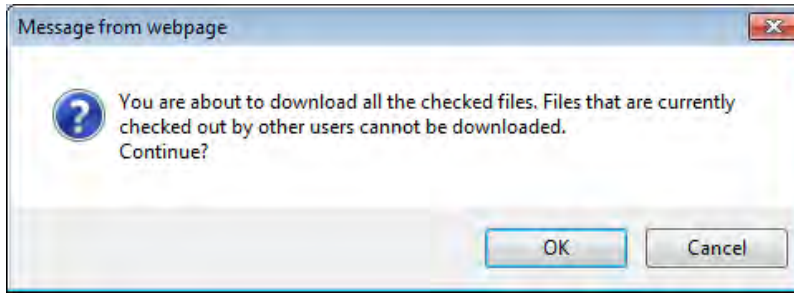

Clicking the top check box marks all files for the selected action. For example, select the top checkbox and a check will appear in all thumbnail checkboxes.
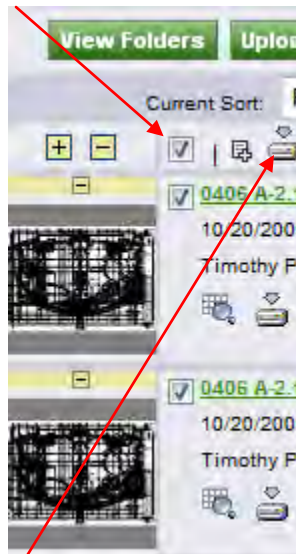
Clicking the Download Checked Files ![icon] icon, located at the top of your file list, will then download all files.

You will get this pop up box, Click OK

When selecting multiple files for download, the download itself will transfer as a single .zip file, which you will need to uncompress.
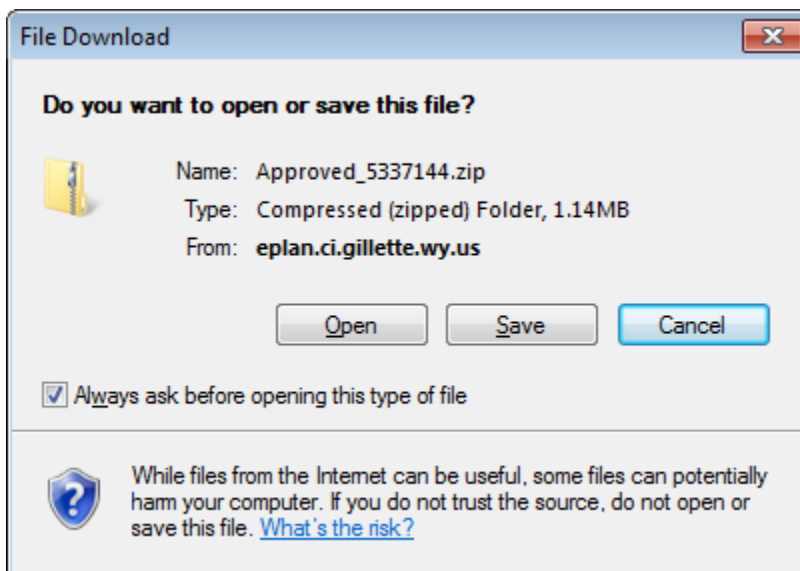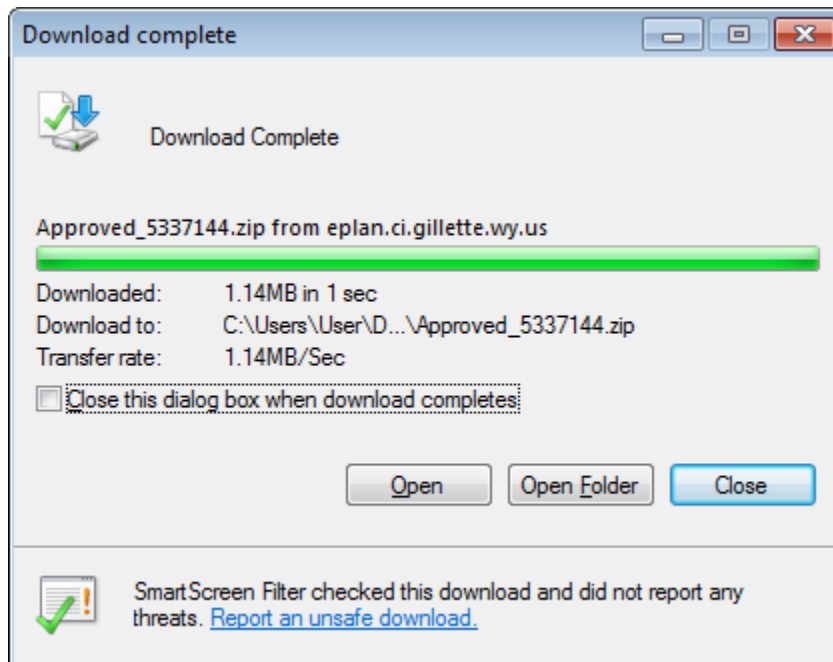
Click the Download Zip File button.

Click the Save Button

Select where you are going to save the files then Click the Save button
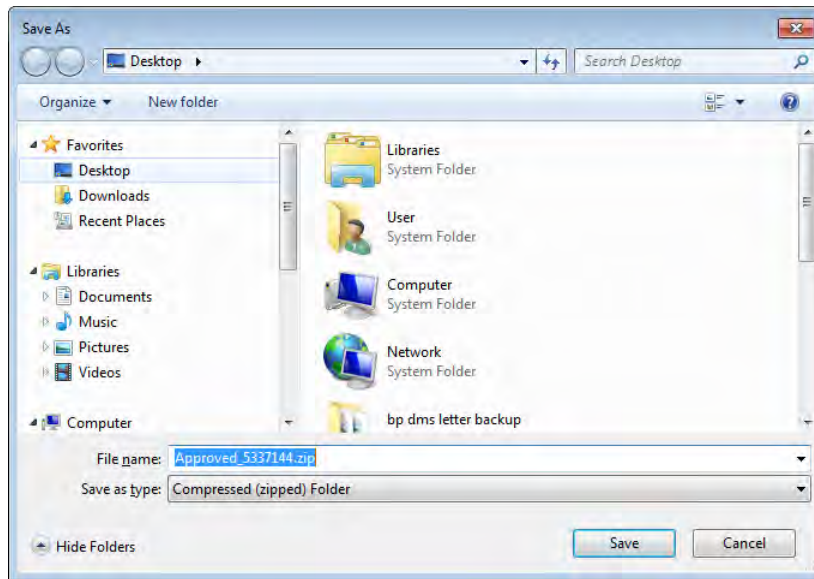
You will get the Download Complete pop up and you can either Click Open, Open Folder or Close.

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